

## Global Outreach of Indian Sustainable Handicrafts Export Market during the Pre-Pandemic and Post-Pandemic

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**Abstract:** Handicrafts serve as a testament to India's rich culture, tradition, heritage, and employment generation. It contributes handsomely to exports and economic growth. By using ecological materials, it promotes the principles of the 3 R's - Reduce, Recycle, and Reuse, and supports environment sustainability. But its growth potential got destabilized during the COVID-19 pandemic. The consequences of the pandemic are palpable, especially in rural areas where a significant portion of the handicraft industry is based. There has been a widespread cancellation of both domestic and export orders, leading to a considerable backlog of inventory. This situation poses a significant challenge to the sector. The paper suggests a strategic approach for the reset, recovery, and rediscovery of the handicraft industry in the 'New Normal' or "Post-COVID-19" era. Policy interventions are identified to address the issues and propel the industry towards a more resilient and sustainable future. The paper finds that digital innovative entrepreneurship in handicraft industry can pave the way for new growth in different dimensions. The increasing preference for online purchases over exhibitions in the post-pandemic era presents a favorable opportunity for producers besides the domestic market and it takes center stage for the Indian handicraft industry, prompting a deeper exploration.

**Keywords:** Handicrafts, Export, Economic Growth, Pandemic, COVID-19.

### INTRODUCTION

The anticipated impact of COVID-19 extends beyond its immediate health implications, influencing consumers' spending capacity and altering global lifestyle patterns (Ghosal et al., 2020; Yadav et al., 2020; Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni & Tarmidi 2021; Igminakhase, 2021; Tripathi et al., 2022; Ministry of Commerce & Industry, 2023). These shifts are expected to have a profound effect on consumption patterns worldwide, thereby influencing the sustainability of Indian handicraft exports both in traditional and emerging markets (Dash & Mishra, 2021; Chaudhary & Mishra, 2022). The key to maintaining a robust presence lies in the adaptability of Indian exporters of handicrafts to align with evolving consumer behaviors (Ministry of Textiles, 2019b; IMD, 2021; Ministry of Commerce & Industry, 2023). In the post-COVID-19 era, there is a crucial need for initiatives aimed at diversifying export markets and exploring new and emerging destinations in Africa, Latin America, Oceania, and CIS countries become imperative (Chaudhary & Mishra, 2022; Tripathi et al., 2022). This strategic move is essential to counterbalance the inherent challenges faced by Indian exporters in the traditional handicraft markets. Policy instruments should be carefully crafted to support and facilitate this diversification, ensuring the resilience and continued success of Indian handicraft exports in the evolving global landscape.

Handicrafts are the products of utility that is made with

simple tools using hands emanating essence of artistic and traditional values (Dash & Mishra, 2021; Khan, 2022; Kumar et al., 2022a, Tripathi et al., 2022). It expresses the uniqueness and richness of culture, history and community through exquisite craftsmanship. Global handicraft industry amounts to around \$1092.2 billion in 2024. China stands first with a share of 30% as compared to Indian share of below 2% (Kennedy, 2020; Kumar et al., 2022a, Tripathi et al., 2022). Indian handicrafts expressing the brilliant mix of colours are eco-friendly and labour-intensive products. They are majorly manufactured by the small and cottage industries. In this capacity they are the major source of employment by engaging the labour, local resources, and low capital investment (Sai Deepak, J., 2008; India Today, 2016; Shah & Patel, 2017; EPCH, 2019; Dausch, 2022; Ministry of Commerce & Industry, 2023) and lead to domestic earnings and foreign exchange (Das & Das, 2019; Khan & Sultan, 2020). Different types of handicrafts - art, metal ware, hand-printed textiles, handloom marble, wooden art ware, embroidered goods, paper-mache crafts, soft stone crafts, zari, chikankari, clay crafts, imitation and fashion jewellery, and leather goods (Dausch, 2022), which have been providing a legacy of richness to India since the times of several kingdoms including "Gupta Rule" (Team & Site, 2020; Kumar et al., 2022a, Tripathi et al., 2022) are the most intricate part of a multifarious nation as India. However, the handicrafts industry suffers from poor forward and backward linkages, which prompted to rule that Indian Handicrafts need delicacy and fineness for sustainability in nature and cost

(India Today, 2016; Khan & Sultan, 2020; Ministry of Commerce & Industry, 2023). In recent time machines have come to contaminate this fineness and skilled craftsmanship and has drastically reduced employment opportunities (Ministry of Textiles, 2019b; IMD, 2021). Handicraft industry employs more than 7 million people at bottom of pyramid (Dash & Mishra, 2021; IMD, 2021). It is dominated by female artisans comprising over 56 %. India has 744 handicrafts' clusters employing 212,000 artisans and offering 35,000 products (Indian Handicrafts, 2023). Major clusters are located in Surat, Bareilly, Varanasi, Agra, Hyderabad, Lucknow, Chennai, and Mumbai. During 2021-22, the total exports of Indian handicrafts were valued at US\$ 4.35 billion with a 25.7 % increase from previous year (Ministry of Textiles, 2019a; OECD, 2020; Indian Handicrafts, 2023). Handicrafts from India are exported to USA, the UK, LAC, Australia, France, Canada, Germany, Japan, Italy, Netherlands, UAE, and Switzerland. USA is the top importer with 38% share in 2020-221 (Kumar et al., 2022a, Tripathi et al., 2022; Indian Handicrafts, 2023). Hand printed textiles, imitation jewellery, embroidery items, and art and metal worked are popular items of export. In 2021-22 Germany alone purchased carpets worth US\$ 116.64 million (Indian Handicrafts, 2023). In India handicrafts exports are handled by "Export Promotion Council for Handicrafts" (EPCH, 2020), which was established under "Companies Act" in 1986-87 (Indian Handicrafts, 2023).

Indian handicrafts registered growth of 5.14% in June 2023 as compared to June 2022 (Ministry of Commerce & Industry, 2023). As per a report the Indian handicraft market is expected to exhibit a CAGR of 7.7 % during 2023-2028 (Wijekoon & Sabri, 2021; Chaudhary & Mishra, 2022). In India, a rapidly growing economy experiences swift economic development, market expansion, and increased international trade of goods and services. Correspondingly, the Indian handicrafts sector plays a crucial role in expanding the reach of "Made-in-India" (EPCH, 2020). Various states and regional clusters make substantial contributions to handicraft exports, playing a key role in generating significant foreign exchange (Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Igminakhase, 2021; Tripathi et al., 2022; Ministry of Commerce & Industry, 2023). The sector is decentralized, with over seven million regional artisans and more than 67,000 exporters/export houses actively promoting regional art and craftsmanship on the global stage (IBEF, 2022). However, its pace of growth has been impeded by the launch of onslaught by COVID-19 pandemic by bringing in changes in consumer spending and thereby impacting consumption pattern globally (Shinozaki & Rao, 2021; Igminakhase, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Chaudhary & Mishra, 2022; Tripathi et al., 2022; Ministry of Commerce & Industry, 2023). This necessitates that Indian handicrafts find new alliances to trade with greater emphasis on customization as per the need of its new business partners. This would help Indian handicraft industry offset the disadvantages exporters confront. In addition, government has to support this sector through appropriate policy measures (Chaudhary & Mishra, 2022). In India 60% of handicrafts

are exported and remaining 40% are consumed domestically (Ministry of Textile (MOT), 2019b). However, dearth of data due unorganized structure of handicraft industry makes it difficult to analyse and evaluate it ( National Handicrafts Poloicy Report, 2016; Ministry of Textiles, 2019b)

## LITERATURE REVIEW

Angraeni and Tarmidi (2021) delineated on the advantage of traditional and regionally influenced handicrafts in vocational training, including craft, textile, woodcraft, handloom, pottery, jamdani, terracotta and embroidery. Tambunan (2018) suggested that researchers, social scientists, academicians, welfare economists and educators can explore and learn the values and opportunities of crafts and advocate for the development of this sector. There is still need for bringing handicrafts for the mainstream business so that this sector can develop at par with other sectors (Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Igminakhase, 2021; Tripathi et al., 2022; Ministry of Commerce & Industry, 2023).

COVID-19 has been the worst of the nightmares for humanity, businesses, and economies across different nations of the world. According to WHO, at least 5 million people died, 279 were infected (WHO, 2021). Due to societal and economic limits imposed by nations on physical interaction and movements to suppress infection, business got affected and many of those belonging to handicraft sector saw their doom at early age (Ministry of Commerce & Industry, 2023). MSME sector specially the handicraft sector was severely affected by COVID-19 pandemic, which require government support to sustain themselves (Andal et al., 2021; Chaudhary & Mishra, 2022). Handicraft sector of India comprises of small business, which is more susceptible to operational disruption and damage due to lack of efficient techniques for crisis management (Shinozaki & Rao, 2021). The crisis of COVID-19 invariably affected all the sectors of Indian economy but the effect on handicraft sector was more visible and pronounced. It resulted in business closures and losses due to quarantine measures (Shinozaki & Rao, 2021; Chaudhary & Mishra, 2022). As per a survey by ADB (Asian Development Bank, 2020), two third of enterprises were temporarily shut down and others 29% experienced decreased operations. Only 4% of the businesses functioned in full capacity. Majority of them operated at half or less. The pandemic caused global recession for small industries including handicraft industry (Muhammad et al., 2021). India also suffered greatly in handicraft sector during COVID-19 and it was specially a death sentence for unsuccessful handicraft firms which faced financial difficulties (Igminakhase, 2021). The effect of COVID-19 was further aggravated due to movement restriction in economy, which impeded the handicraft product businesses' digitalization (Tudy, 2020; Parilla, 2021). Reyes (2022) discussed the large-scale financial impact of pandemic and governmental policies which were churned out at the time of COVID-19 by discussing and consulting the executives and directors of the major commercial firms in India. The study of Shinozaki and Rao (2021) discussed the hardships, handicraft sector faced during pandemic.

Kundu et al. (2021) advocated for government financial support for this type of informal sector.

Yadav et al. (2022a) discussed the decline in growth rate of small business in handicraft sector which faced sharp decline in growth due to pandemic. This decline was especially caused in the first quarter of the fiscal year 2020-2021, which led to decline in net sales to the tune of 66.7%. Ghosal et al. (2020) examined the impact of COVID-19 on the household industry and handicraft sector, which were particularly run by females. He estimated that 69% of females are engaged in handicraft sector. The study advocated proper skill training, vocational training based on local traditions and customs. In addition, there is need for making artisans acquainted with religious toys of Channapatna, Moonjcraft of Pragraj, Gorakhpur terracotta, bamboo bags, jute bags, banana fibre, etc. The study of Tripathi et al. (2022) focused on the impact that was cast by gig economy in handicraft industries and provided for suggestions and strategies for welfare of gig workers through skill training and social security (Ghosal et al., 2020). The study of Yadav et al. (2022c) concentrated its research on the “One District One Product (ODOP)” scheme adopted in Uttar Pradesh and provided a preliminary framework for the growing global handicraft index for small companies. Yadav et al. (2022b, 2022d) advocated for providing assistance to women entrepreneurs in handicraft sector to get training in digital technology for marketing and business expansion. At the time of COVID-19, handicraft workers of India were supported by MNREGA and were engaged in making masks, wooden craft and stone carving (Ghosal et al., 2020; Yadav et al.,

2020). The study of Ghosal et al. (2020) and Yadav et al. (2020) also provided for the idea of “Global Handicraft Index”, which also included the strategies for handicraft artisans and strategies for their growth in South-East Asia. The study of Andal et al. (2021) delineated on the aggravated situation after the declaration of state-wide lockdown due to COVID-19. Sardar et al. (2021) discussed the difficulties in functioning of handicraft sector after the imposition of lockdowns. Due to COVID-19 several handicraft businesses registered themselves with digital marketing and adopted online services, which boosted their e-share business at global level from 14% to 18% between 2019 to 2020, and is expected to reach to 22% by 2024 (UNCTAD, 2021). Handicraft sector faces several dangers and concerns, which are difficult to recognize, so a multipronged strategy should be implemented to defeat the slump it has entered into and it can once again shine as the pride of India (Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Igminakhase, 2021; Yadav et al. 2022a, Yadav et al., 2022b; Kumar et al., 2022a, Tripathi et al., 2022; Ministry of Commerce & Industry, 2023). In the backdrop of these tendencies and latest developments in the condition and position of handicraft sector, the following research objectives are being studied in present study:

#### Research Objectives

- I. To explore the effect of COVID-19 pandemic on Indian Handicraft Exports in Pre-Pandemic and Post-Pandemic time period.
- II. To study the policies and strategies for reset, recover, and rediscover for Handicraft Industry.

### RESEARCH METHODOLOGY

The study utilizes longitudinal study approach to study the condition of Indian handicrafts during COVID-19 pandemic to explore the impact of pandemic on Indian handicraft exports in pre-pandemic and post-pandemic time period. Longitudinal studies utilize continuous or repeated measures to track specific individuals, conditions or aspects over extended durations, typically spanning years or even decades (Belle G et al, 2004). These studies are primarily observational and descriptive with analyses involving the collection of quantitative and/or qualitative data, on various exposures and outcomes, without external interventions. The utility of this type of study lies in its effectiveness for assessing the correlation between risk factors and phenomenon development, as well as evaluating the outcomes of treatments/or exposures over varying time frames. By collecting data for individuals, conditions of aspects within a predetermined group/phenomenon, these studies enable the application of suitable statistical tests to analyze changes over time for the entire group or specific individuals or aspects (Belle G et al, 2004)

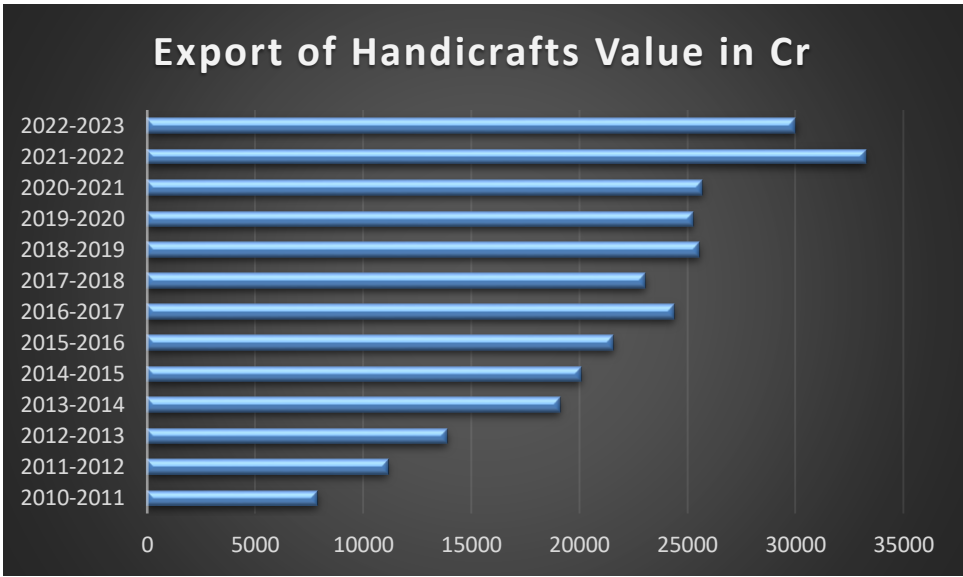
#### Indian Handicraft Export Scenario (2010-20)

**Note:** Due to the COVID-19-19 export data for years 2019-20 and 2020-21 is not available on government EPCH site.

**Table 1: Trend of Indian Handicraft Exports 2010 to 2020 [Created by Author, Source: EPCH, 2020]**

Export of Handicrafts	
Year	Value in Cr
2010-2011	7870.31
2011-2012	11130.04
2012-2013	13892.59
2013-2014	19103.98
2014-2015	20082.53
2015-2016	21557.12
2016-2017	24392.39
2017-2018	23029.36
2018-2019	25548.97
2019-2020	25270.14

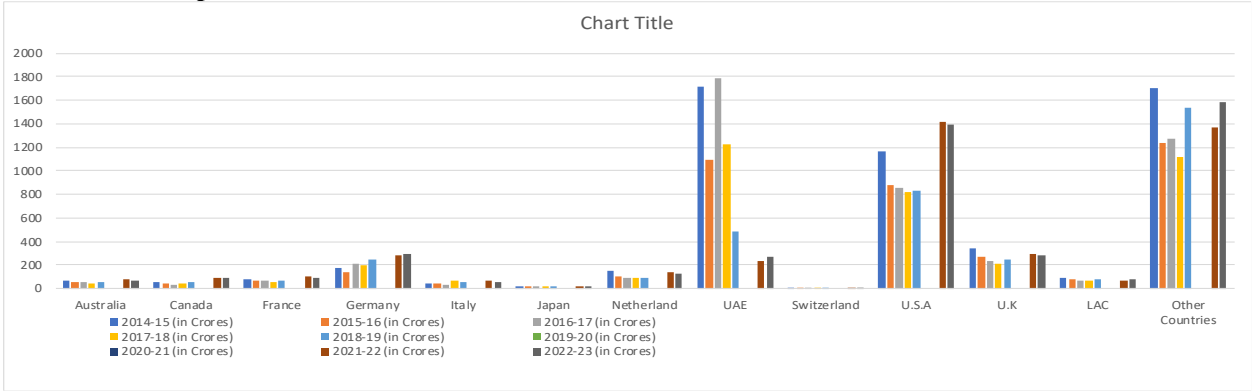
2020-2021	25679.98
2021-2022	33253.0
2022-2023	30019.24



**Figure 1: Export of Handicrafts, 2011-2023 (Created by Author)**

For about thirteen years from 2010-11 to 2022-23 the exports of Indian handicrafts have grown steadily from INR 7870 Crore to INR 30019.24 Crore as per the data of Export Promotion Council of Handicrafts (EPCH, 2019). However, in 2017-2018 there was small dip in sales, which regained quickly. There are 8 categories of handicrafts contributing 70% of exports (Ministry of Textile, 2019b), which include Art Metalware, Woodware Export, Handprinted Textiles, Zari and Zari Goods, Embroidered and Crocheted Goods, Imitation Jewellery, Shawls Artware etc to nations like US, UK, Australia, Latin American countries (LAC), Italy, the Netherlands, Canada the UAE, Germany, and France (EPCH, 2019). Section given below provides a detailed analysis of exports from 2014 to 2023:

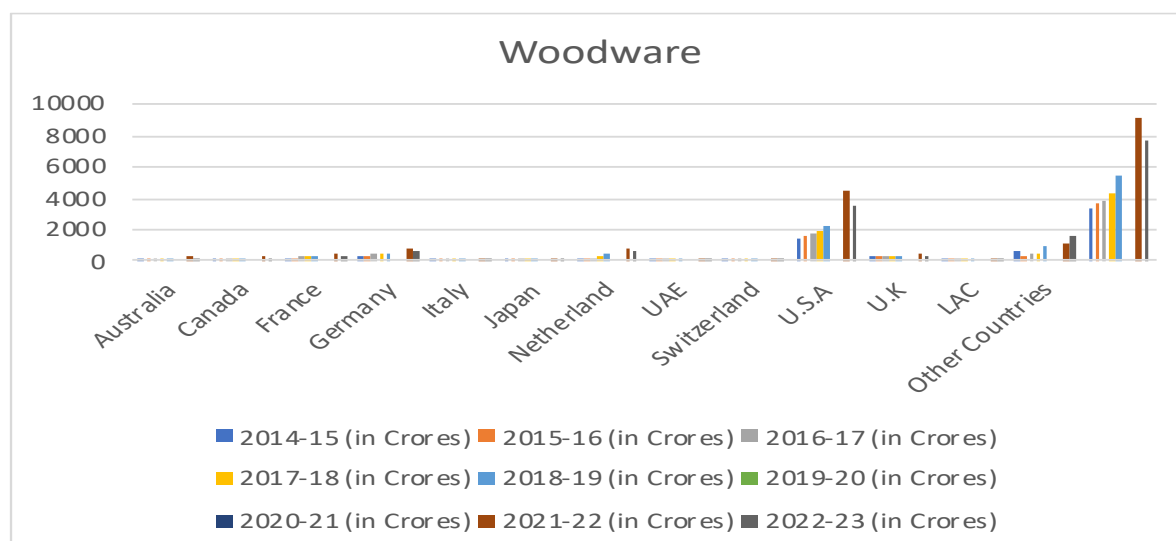
**Art Metal Ware Export**



**Figure 2: Export of Art Metal Ware (Created by Author)**

Graph shows that USA, UAE and the UK are major importers of Indian handicrafts amounting to INR 7352.99 Crore, INR 6783.3 Crore, and INR 1876.82 Crore respectively. However, the exports have witnessed declining trend with successive years with exports of INR 5597.08 Crore in 2014-15, INR 4011.56 Crore in 2015-16, INR 4705.52 Crore, INR 3955.81 Crore, to INR 3762.79 Crore for years 2016-17, 2017-18 and 2018-19 respectively (EPCH, 2020). However, in 2021-22 and 2022-2023 the export of art and metalware increased from INR 4152.56 Crore to INR 4349.37 Crore (EPCH, 2020)..

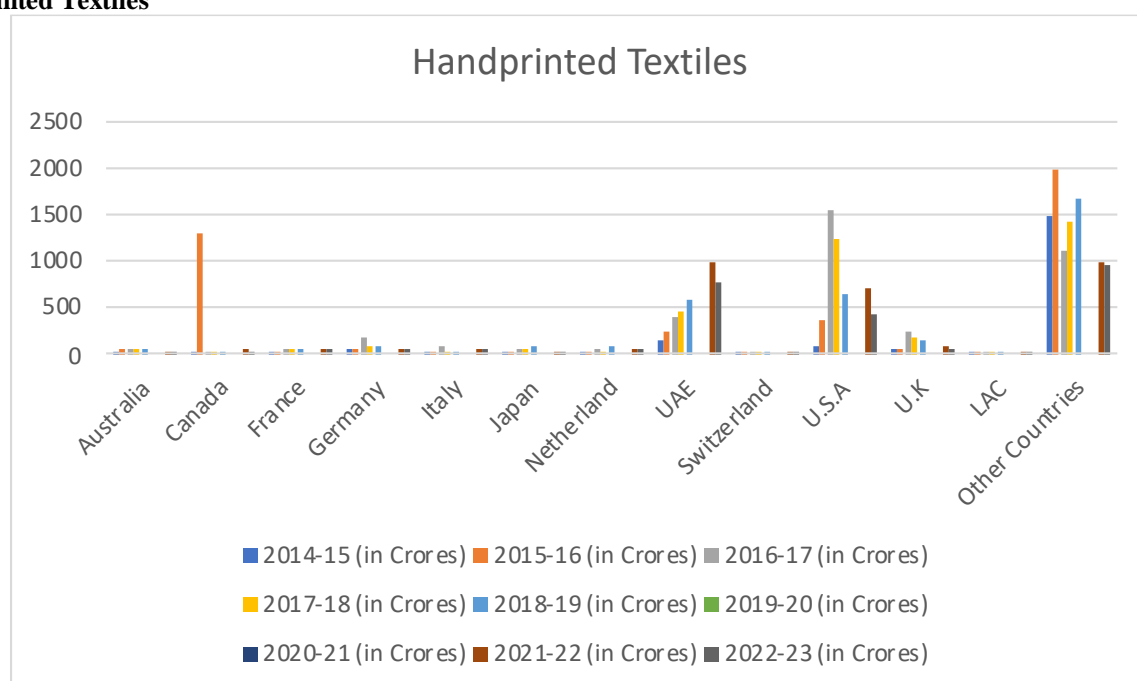
**Woodware Export**



**Figure 3: Export of Wood Ware (Created by Author)**

From 2014-15 to 2022-24 USA has been the major importer of woodcraft from India, followed by Germany and Netherland, amounting to INR 16865.15 Crore, INR 3516. Crore Cr and INR 2623.49 Crore respectively. Woodcraft has witnessed exports of INR 3359.39 Crore for 2014-16, for 2015-16 they were INR 3608.51 Crore, and INR 3916.01 Crore, INR 4267.37 Crore, and INR 5424.85 Crore for 2016-17, 2017-18, 2018-19 respectively (EPCH, 2020). Finally for last two years 2021-22 and 2022-23 the exports for woodcraft stood at INR 9080.88 Crore to INR 7622.98 Crore respectively (EPCH, 2023).

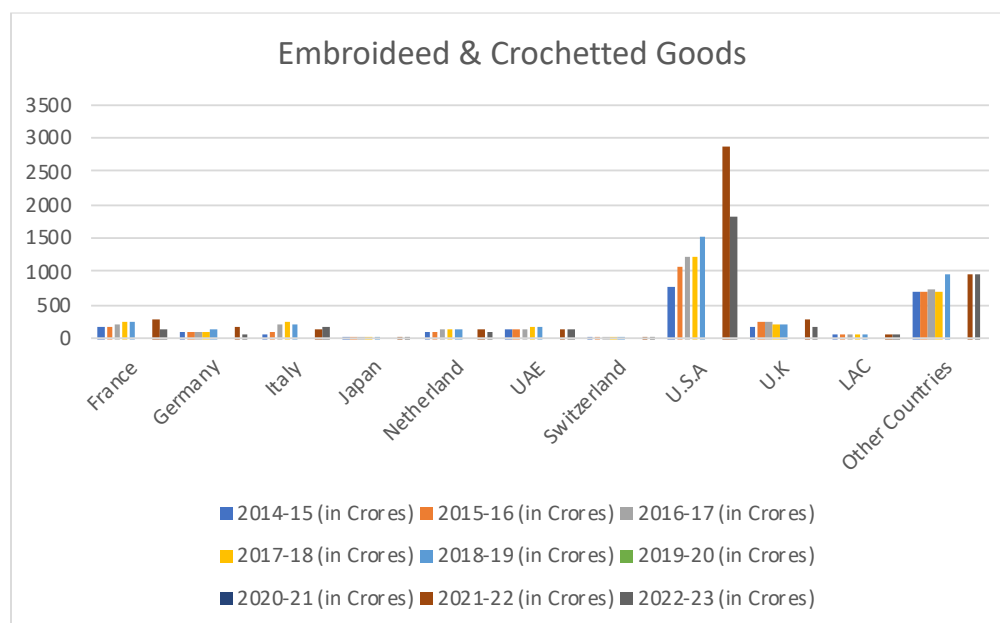
### Handprinted Textiles



**Figure 4: Export of Hand Printed Textile (Created by Author)**

The USA, UAE and Canada stood as the top three largest importers of Indian hand printed textile amounting to INR 4987.2 Crore, INR 3554.51 Crore and INR 1468.21 Crore respectively. The textiles rode on a rising trend in 2014-15 and 2015-16 with INR 1907.29 Crore and INR 4145.33 Crore respectively (EPCH, 2020). However, it declined from 2016 to 2019 and recorded values of INR 3847.4 Crore INR 3665 Crore, INR 3483.16 Crore, respectively. Immediately after COVID-19-19 the textile exports declined in 2021-22 to stand at INR 3089.97 Crore and INR 2524 Crore in 2022-23 (EPCH, 2023).

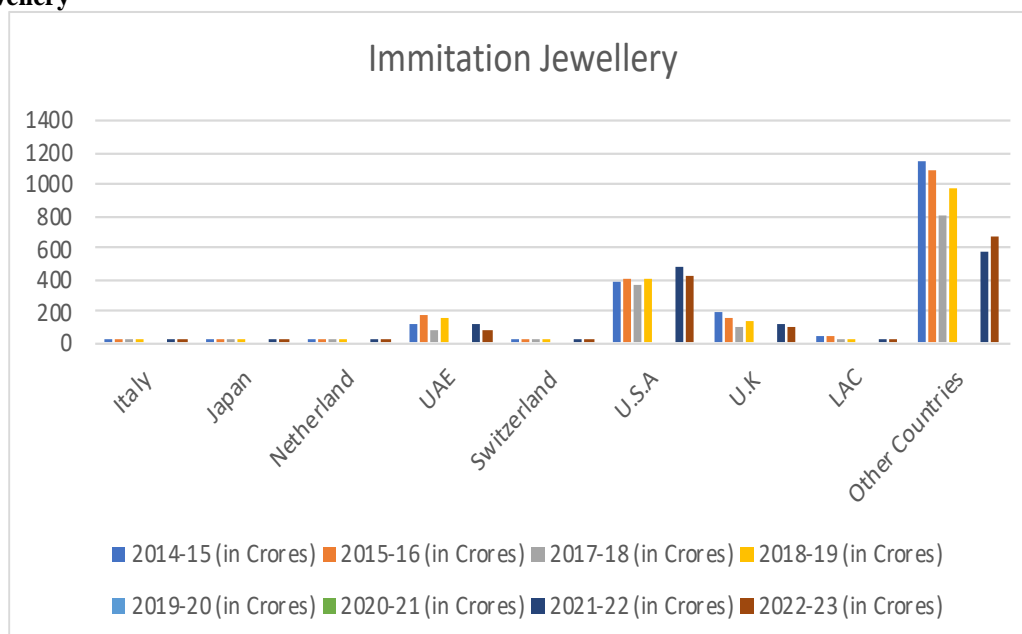
### Embroidered and Crocheted Goods



**Figure 5: Export of Embroidered and Crocheted Goods Cr (Created by Author)**

The USA, UK and France imported largest amount of Indian embroidered and crocheted goods, which stood at INR 10516.01 Crore, INR 1550.09 Crore, and INR 1495.08 Crore respectively for these nations. The value of exports stood at INR 2430.93 Crore in 2014-15, INR 2937.21 Crore in 2015-16, rose to INR 3227 Crore in 2016-17, INR 3305.16 Crore in 2016-17. It rose to INR 3305.16 Crore in 2017-18 and INR 3935.97 Crore in 2018-19 (EPCH, 2020) showing an upward trend. Post COVID-19 the figures rose to INR 5340.72 Crore in 2021-22 and again declined to INR 3825.43 Crore in 2022-23.

### Imitation Jewellery

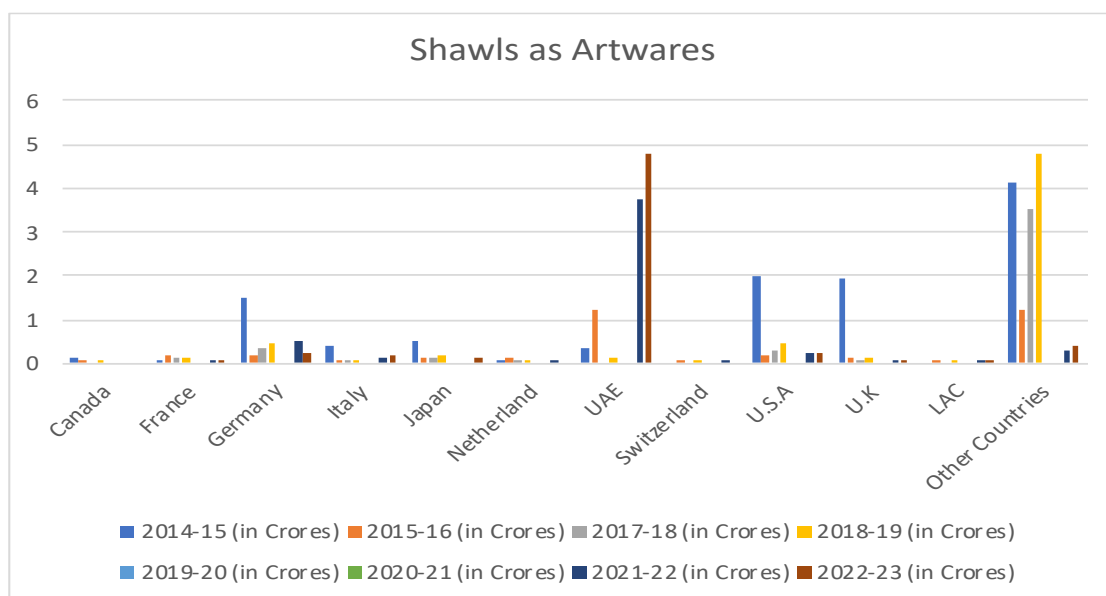


**Figure 7: Export of Imitations Jewellery in Cr (Created by Author)**

The USA and other countries are largest importers of imitation jewellery from India amounting to the imports of INR 2475.75 Crore and 5266.72 Crore respectively. In 2014-15 and 2015-16 the exports stood at 2113.33 Crore and 1540.8 Crore (EPCH, 2020) respectively, which amounts to a huge difference in both the years. Exports rose in 2018-2019 to INR 1930.4 Crore, after COVID-19 in 2021-22 it stood at INR 1539.02 Crore, and for 2022-23 it rose to INR 1553.37 Crore.

### Shawls & Artwares

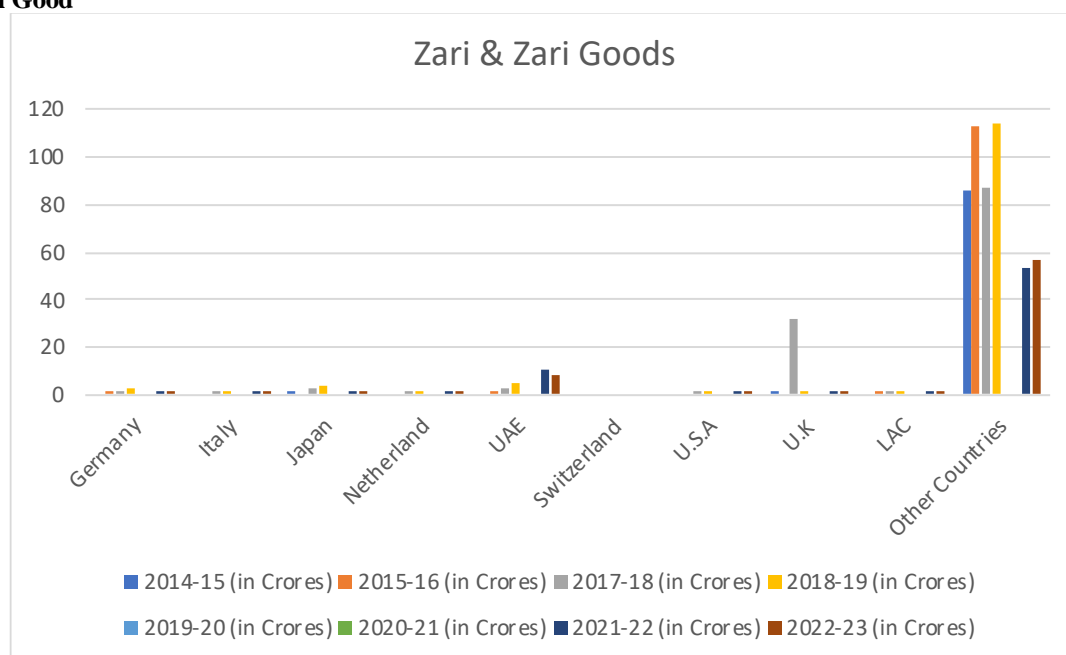




**Figure 8: Export of Shawls & Art wares in Cr (Created by Author)**

The USA, UK and Germany are top three importers of shawl from India amounting to INR 10.28 Crore, INR 3.46 Crore, and INR 3.26 Crore respectively from the year 2014 to 2023. Exports stood at INR 11.34 Crore in 2014-15, INR 3.67 Crore in 2015-16, which increased to INR 5.06 Crore in 2017-18 to INR 7.02 Crore in 2018-19 (EPCH, 2020). After COVID-19 in 2021-22 the exports decreased to stand at INR 5.18 Crore and again increased to INR 6.08 Crore in 2022-23.

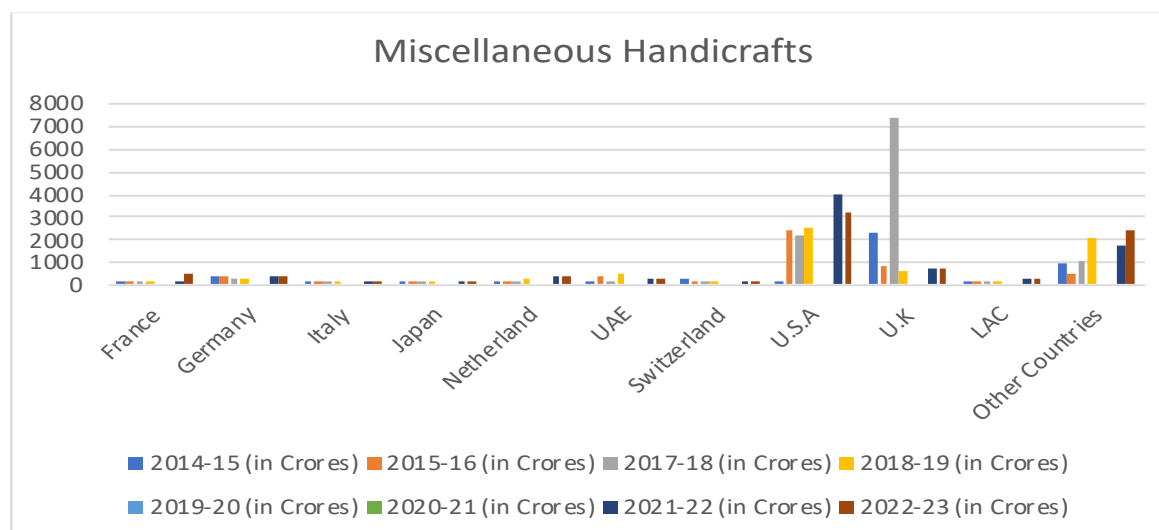
#### Zari & Zari Good



**Figure 9: Export of Zari & Zari Goods in Cr (Created by Author)**

Zari and Zari goods stood at 399.95 Crore in 2014-2015. It is largely imported by the category of other countries. It showed an upward trend for the years 2014-2015, 2015-2016, 2017-2018 and 2018-2019 to account for INR 86.28 Crore, INR 113.62 Crore, INR 129.68 Crore and INR 130.02 Crore respectively (EPCH, 2020). Indian exports of handicrafts were expected to cross INR 30,000 Crore mark, however, it decreased by 3.35% (Jonathan Kennedy, 2020 Report). Demand came to standstill during COVID-19 and forced shut downs and bankruptcies. In 2021-22 when trade resumed the exports of zari and zari goods decreased to INR 69.4 Crore and INR 71.25 Crore in 2022-23.

#### Miscellaneous Handicrafts



Due to the COVID-19 export data for years 2019-20 and 2020-21 is not available on government EPCH site.

The USA, UK, and Canada are the major nations importing embroidered and crocheted goods from India whose imports stood at INR 14376.1 Crore, INR 12466.59 Crore and INR 9420.32 Crore respectively. A small constant increase was witnessed in this category of exports. It stood at INR 4725.05 Crore in 2014-15, increased to INR 5507.74 Crore in 2015-16, rose in 2016-17, 2017-18, and 2018-19 with respective values of INR 20575.08 Crore, INR 20575.08 Crore and INR 3935.97 Crore (EPCH, 2020). Post COVID-19 the values rose to INR 8547.85 Crore and INR 8736.18 Crore respectively for 2021-22 and 2022-23.

### Impact of COVID-19 on Indian Handicraft

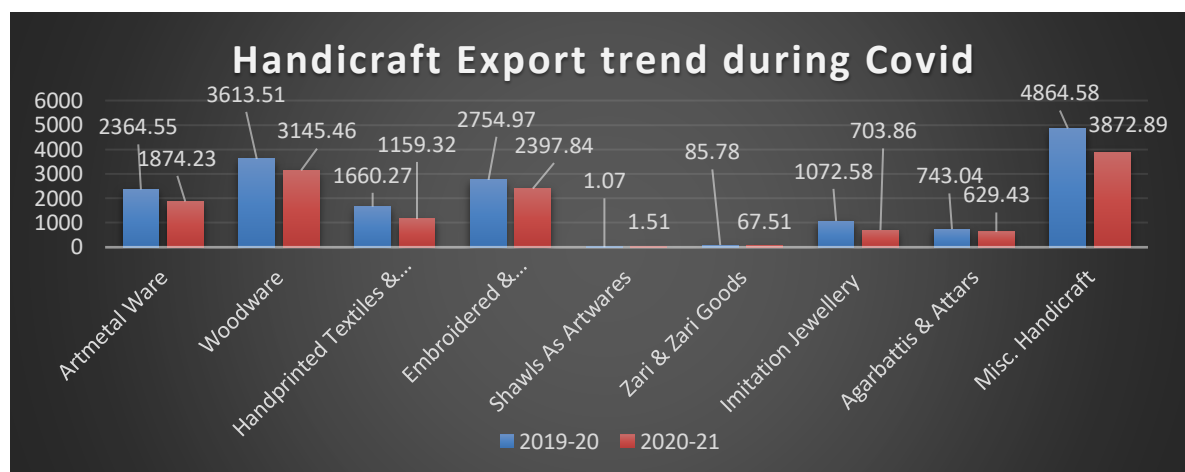
The profound repercussions of COVID-19 pandemic significantly hampered the export growth of Indian Handicrafts, compounding the existing challenges from the aftermath of demonetization in 2016, the unsteady implementation of GST, financial constraints, outdated manufacturing technology, and complexities in the supply chain (Ghosal et al., 2020; Yadav et al., 2020). Adding to the complexity, the Indian handicrafts industry is predominantly part of the rural informal sector. The pandemic triggered widespread cancellations and postponements of orders due to reduced consumer willingness due to low or no income (owing to job losses and economic uncertainty) to make purchases, resulting in a surplus of inventories (Ghosal et al., 2020; Yadav et al., 2020; Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Iginakhase, 2021; Kumar et al., 2022a, Tripathi et al., 2022). Prolonged lockdowns, labor migration, shortages of raw materials, business closures, payment and certification issues, and disrupted logistics further exacerbated challenges for the handicrafts sector (Ghosal et al., 2020; Yadav et al., 2020; Iginakhase, 2021; Kumar et al., 2022a, Tripathi et al., 2022). A substantial decline in both domestic sales and international export orders was observed, particularly due to cancellations from severely affected regions like the EU, USA, and UK, which collectively accounted for 70% of exports (WHO, 2021). This downturn in exports had a cascading effect on the entire supply chain, logistics, and end-retail, leading to a staggering loss of 2 million jobs. As per data labourers engaged in handicraft sector suffered severely. They had no work due to slump in exports and negligible demand from domestic sector. They could neither get help from digital media as work in handicraft sector is done in traditional pattern and labourers have less digital exposure and knowledge, nor from the government which was equally perplexed in finding solutions in chaotic pandemic phase (Shinozaki & Rao, 2021; Tripathi et al., 2022; Yadav et al., 2022).

### Handicraft Export trend during COVID-19

**Table 2: Trend of Indian Handicraft Exports 2019-20 (April to November) & 2020-21(April to November) [Created by Author, Source: EPCH, 2020)**

Handicraft Category	2019-20 ( In Crore )	2020-21 ( In Crore )
Artmetal Ware	2364.55	1874.23
Woodware	3613.51	3145.46
Handprinted Textiles & Scarves	1660.27	1159.32
Embroidered & Crocheted Goods	2754.97	2397.84
Shawls As Artwares	1.07	1.51
Zari & Zari Goods	85.78	67.51
Imitation Jewellery	1072.58	703.86
Agarbattis & Attars	743.04	629.43
Misc. Handicraft	4864.58	3872.89





**Figure 10: Export of Handicraft Exports 2019-20 (April to November) & 2020-21(April to November) Cr (Created by Author)**

At the advent of COVID-19 in India handicraft sector started declining from February, 2019. The exports of Art metal wares, woodworks, hand printed textiles, embroidered and crocheted goods, Zari and Zari Goods, Imitation Jewellery, Agarbattis, Attars and Miscellaneous Handicrafts showed a declining trend with values of 20.74%, 12.95%, 30.17%, 12.96%, 21.30%, 34.38%, 15.29% and 20.39% respectively. However, there was increase in the growth of shawls and Artwares to the tune of 41.32% (EPCH, 2023). As per the version of “Business Standard” handicraft sector of India lost a business of INR 8000 Crore (The Hindu Businessline, 2020). There was low demand from domestic sector owing to low consumer intention of purchase due to loss of jobs and economic uncertainty (Upadhyay & Jain, 2019; Choudhary, A. & Mishra, P., 2020; Shahi et al., 2020; Kushwah et al., 2020; Kimiagari & Asadi Malafe, 2021; Hyun et al., 2021; Wang et al., 2021). Nonetheless, there is a vibrant part to this glum phase and that is large number of unique opportunities for handicraft sector of India. With more and more nations losing trust in China, the global buyer is looking towards India for handicrafts that are biodegradable, and are good substitutes (Ali & Sudan, 2018; Choi & Johnson, 2019; Rusyani et al., 2021) for machine made handicrafts and plastic products from China (EPCH, 2023). Hence COVID-19 showed that adversity can be an opportunity for Indian handicraft industry, due to which India has got a chance to replace China. Exporters from India can look for product specific and country specific strategies to excel international handicraft markets. China led the international handicraft trade with Wooden Craft (India : 3.3% , China : 37.3 % ) , Stone Craft ( India : 2.4% , China : 18 % ) , Glass ware ( India : 0.8 , China : 22.9 % ) Ceramics ( India : 2.6 % , China: 38.3 % ). However, post COVID-19 India can grab this opportunity to lead international handicrafts trade ((Kirtika Suneja, 2020; EPCH, 2023).

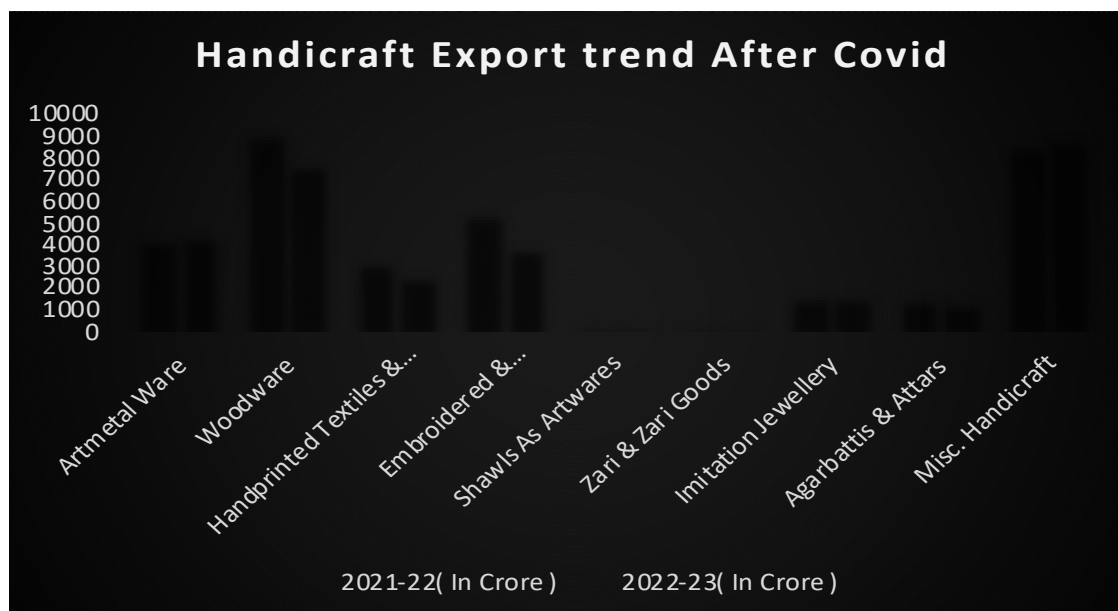
### Handicraft export trend after COVID-19

According to the actual data the exports of handicrafts have shown a decrease of INR 3233.76 Crore from INR 33253.00 to INR 30019.24 Crore, a decrease of 9.72% in rupees term. In dollar terms, the exports have shown a decrease of US \$731.29 Million i.e. the exports decreased by 16.40% over the similar period in 2021-22. In US Dollar terms, the decrease was even more pronounced, with exports dropping by 16.40% from US\$ 4459.76 Million in 2021-22 to US\$ 3728.47 Million in 2022-23. Certain categories demonstrated positive trends in Rupee terms, including Artmetalware, Shawls, Artwares, Zari & Zari Goods, Imitation Jewellery, and Misc. Handicrafts, with growth rates of 4.74%, 17.37%, 2.67%, 0.93%, and 2.20%, respectively. However, Woodwares, Handprinted Textiles, Embroidered & Crocheted Goods, and Agarbatties & Attar goods exhibited negative growth at 16.05%, 18.30%, 28.37%, and 6.83%, respectively. In USD terms, Shawls as Artwares was the only category to experience growth (8.57% in Rupee terms), while Artmetalware, Woodwares, Hand Printed Textiles, Embroidered & Crocheted goods, Zari & Zari Goods, Imitation Jewellery, Agarbatties & Attars, and Misc. Handicrafts saw declines of 3.00%, 22.26%, 24.34%, 33.67%, 4.94%, 6.53%, 13.71%, and 5.35%, respectively (EPCH, 2023). The overall decrease was 9.72% in Rupee terms and 16.40% in USD terms. Geographically, exports to Japan, LAC, and Other countries increased by 29.17%, 0.38%, and 19.18% in Rupee terms. However, exports to Australia, Canada, France, Germany, Italy, Netherland, UAE, Switzerland, USA, and U.K witnessed declines of 12.92%, 17.60%, 0.88%, 21.39%, 3.38%, 18.41%, 12.39%, 29.60%, 21.83%, and 19.12%, respectively. In USD terms, exports to Japan and Other Countries increased by 19.62% and 10.37%, while exports to Australia, Canada, France, Germany, Italy, Netherland, UAE, Switzerland, USA, U.K, and LAC declined by 19.36%, 23.69%, 8.21%, 27.20%, 10.53%, 24.44%, 18.86%, 34.79%, 27.61%, 25.10%, and 7.04%, respectively. Details are as under:

**Table 3: Trend of Indian Handicraft Exports 2021-22 (April to March & 2022-23 (April to March) [Created by Author, Source: EPCH, 2020]**

Handicraft Category	2021-22 (In Crore)	2022-23 (In Crore)
Artmetal Ware	4152.56	4349.37
Woodware	9080.88	7622.98
Handprinted Textiles & Scarves	3089.97	2524.61

Embroidered & Crochatted Goods	5340.72	3825.43
Shawls As Artwares	5.18	6.08
Zari & Zari Goods	69.40	71.25
Imitation Jewellery	1539.02	1553.37
Agarbattis & Attars	1427.42	1329.97
Misc. Handicraft	8547.85	8736.18



**Figure 11: Export of Handicraft Exports 2021-22 (April to March) & 2022-23(April to March) Cr (Created by Author**

The exports of Artmetal Ware stood at INR 4152.56 Crore in 2021-22 but rose to INR 4349.37 Crore in 2022-23; for Woodware the value of exports stood at INR 9080.88 Crore for the year 2021-22. However, it decreased to INR 7622.98 Crore in 2022-23; Handprinted Textiles & Scarves stood at INR 3089.97 Crore in 2021-22 but declined to INR 2524.61 Crore in 2022-23. The exports figure for Embroidered & Crochatted Goods stood at INR 5340.72 Crore for the year 2021-22, but declined to INR 3825.43 Crore in 2022-23; the exports for Shawls As Artwares were INR 5.18 Crore for 2021-22, which increased to INR 6.08 Crore for 2022-23. Zari & Zari Goods stood at INR 69.40 Crore in 2021-22 and rose to INR 71.25 Crore in 2022-23. The value for exports of Imitation Jewellery was INR 1539.02 Crore for the year 2021-22, which rose to INR 1553.37 Crore in 2022-23. The value of exports for Agarbattis & Attars stood at INR 1427.42 Crore for 2021-22, but declined to become INR 1329.97 Crore in 2022-23, finally the value of exports for Misc. Handicraft stood at INR 8547.85 Crore for 2021-22, which increased to INR 8736.18 Crore in 2022-23 (EPCH, 2023; Yadav et al., 2022). EPCH has identified the necessity for a robust digital institution and the development of a national index to support artisans, enhance competition, and boost the export of handicrafts from Uttar Pradesh to other countries. They advocate for a dedicated package for the handicraft sector or inclusion in the PLI scheme by the government to enable the sector to thrive and compete globally. Additionally, Yadav et al. (2022b) propose a global handicraft index, outlining potential parameters and solutions for improved competition and export of handmade products compared to machine-made

alternatives. This initiative aims to elevate the marketing value of handicraft products. In the same year, the researchers conducted an initial analysis of the transformation and innovation in handmade carpet production. They explored the types of institutions and training centers that could enhance the production and value of the carpet industry (Yadav et al., 2022a), and highlight the traditional gig workers in small industries or the handmade sector. They emphasize the unique challenges faced by these workers compared to those in different sectors like BPO or telecommunications (Khan et al., 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; Kumar et al., 2022a, IBEF, 2022; Tripathi et al., 2022).

The marketing for handicraft products and mediators is distinct from other industries, requiring a tailored approach. Handcraft management experts employ product marketing, and there is a recognition of the additional components beyond the traditional four Ps of marketing, including partnership, packaging, position, programming, and people (Ramadhana, 2020; Yadav et al., 2020; Punamiya, 2020 Jul 21; Igminakhase, 2021; Shinozaki & Rao, 2021; Andal et al., 2021). The pandemic-induced state-wide shutdown impacted all industries, particularly affecting small and unorganized sectors, including the craft industry (Yadav et al., 2020; Ghosal et al., 2020; Angraeni & Tarmidi 2021; Andal et al., 2021; Menon et al., 2021). Craftsmen within this sector experienced significant hardships, facing joblessness, and the government-imposed restrictions on exporting their handmade products to other countries. The labor section in the micro, small, and medium-sized enterprises (MSME) sector encountered numerous

challenges as companies were unable to provide work (Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). During this period, rural residents, particularly women, engaged in crafting homemade masks to support government efforts. This initiative not only addressed immediate needs but also enhanced their skills, referred to locally as "hunnar" (Yadav et al., 2022f). The craft industry's reliance on conventional methods was also evident during this time, with limited familiarity among craftspeople and workers with digital technology (Khan et al., 2021; Mohius-din, 2014).

#### **Impact Covid-19 on the Major Handicraft Trade Fair**

The unprecedented repercussions of COVID-19-19, coupled with prolonged losses from lockdowns (Ghosal et al., 2020; Yadav et al., 2020; Menon et al., 2021; Shinozaki & Rao, 2021; Andal et al., 2021; Angraeni and Tarmidi 2021; Igminakhase, 2021; IBEF, 2022; Kumar et al., 2022a, Tripathi et al., 2022), compelled India to cancel its major handicrafts and gift trade show amid the pandemic. The cancellation of the 49<sup>th</sup> edition of "IHGF-Delhi Fair-Spring" 2020 by EPCH had far-reaching effects on exports from significant Indian clusters, including Moradabad, Saharanpur, Jodhpur, Jaipur, Agra, Narsapur, Firozabad, the North-eastern region, and various others. In response to these challenges, the "Spring Fashion Fair Show 2021 Asia" took a revolutionary step by transitioning to a virtual format. This digitally organized virtual trade fair not only attracted international buyers but also garnered attention from domestic retailers. The digital platform proved to be a game-changer, overcoming language, time, and transportation barriers to capture a vast customer and audience base.

#### **Initiative for Reset, Recover & Rediscover for Handicraft Industry in New Normal**

The handicrafts sector directly comprises of 7 million artisans in India and owing to its unorganized nature it is home to more than 200 million artisans and workers (IBEF, 2022). With this magnitude and wide range of skilled artisans Indian handicrafts sector has the potential to turn into a multi-billion-dollar industry (Igminakhase, 2021; Shinozaki & Rao, 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). Although, handicraft sector of India suffered huge losses, however the advent of COVID-19 has led to up surging of online market opportunities specifically for retailers and small businesses (Yadav & Mahara, 2019), attracting more customer base in comprising to bustling markets of past (Meskaran et al., 2013), which were witnessing stagnation (Oyekunle & Sirayi, 2018; Škiltere & Bormane, 2018). With changing choices, tastes and preferences a newer mindset of self-purchasing is evolving (Yadav & Mahara, 2019). Moreover, the purchase intentions of consumers are being increasingly impacted by "social media exposure" and "social media advertizing" to indulge in "impulsive buying" from online outlets (Zafar et al., 2021). Although large number of retailers in rural areas were struggling previously (Garg et al., 2005; Mitra & Agrawal, 2010), which led to loss of customer base (Giampiccoli & Saayman, 2018). However, with online opportunities the lost cultural lineage and intangible heritage of historical

values of communities and several tribes, which was devastated can be reinstated (Menon et al., 2021). Indian handicrafts have a diverse variety of designs and other materials. Along with the diversities within the countries, it influences the handicrafts of various regions due to the cultural, geographical and demographic differences (Khan et al., 2021; Yadav et al. (2022a). Due to the diversifications, the products can be segmented according to its speciality in various countries and regions. The EPCH has been planning to show cast digital and virtual trade fairs. Indian handicrafts are popular and are exported worldwide but due to the lockdown, international trade completely stopped and the already manufactured products were getting wasted, which was to be exported and cancelled due to the sudden outcome of pandemic. Now, the Export Council is focusing for identification of new markets like ASEAN, Latin America Countries (LAC), Japan etc. Domestic market may also be an opportunity for exporters (PIB Delhi, 2021). Therefore, the handicraft sector can search and explore new opportunities towards the domestic markets. The finished goods started selling online on e-commerce websites, which lead to an essential introduction of the real Indian products with the Indian consumers (Khan et al., 2021; Angraeni and Tarmidi 2021; Kumar et al., 2022a, IBEF, 2022; Tripathi et al., 2022). The "Atma-Nirbhar" and "Vocal for Local" initiated by Government of India may also leverage influence the sale of handicraft products in order to support small craftsmen and artisans.

Despite great damage suffered by Indian economy due to COVID-19 pandemic, which changed the trade scenario in a revolutionary way and entailed significant changes in trade partners and supply chain logistics (Punamiya, 2020 Jul 21; Yadav et al., 2020; Shinozaki & Rao, 2021; Andal et al., 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; Kumar et al., 2022a; IBEF, 2022) it has created some impressive opportunities. The exports of India declined by 34% YoY in March 2020 and 60% in April 2020. The handicraft sector of India has great worth and has potential to revive with its inherent mastery and skill of artisans of its handicraft industry (Tripathi et al., 2022). It has several unique features to create novel opportunities out of adversity. Firstly, India is an expanding economy, which is bound to bounce back on the basis of its huge domestic customer base, and very high propensity to consume, reflected in its huge online purchases even during COVID-19 in post lockdown period (Igminakhase, 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). Secondly, its handicrafts are authentic and handmade, which is an attraction in itself and attracts international customers. Thereafter, its supply chain and logistics are improving to provide seamless network of deliveries to every nook and corner of India. Indian handicrafts boast of being natural and biodegradable, which acts to its advantage in attracting international customers, who are more concerned with health and environment issues (Punamiya, 2020 Jul 21; Yadav et al., 2020; Shinozaki & Rao, 2021; Andal et al., 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2021, 2022,; Kumar et al., 2022a, IBEF, 2022). Next are the earnings that are going to accrue to this sector due

to exports of natural, authentic, and biodegradable products, which will help enhance the quality of handicraft by improving compensation of artisans. Government of India has also come up with many schemes for the financial inclusion of artisans and other people in general, which is going to improve their financial condition and help them produce and sell more. Moreover, with very high emphasis on enhancing infrastructure, technology, and marketing strategies, India is fostering development of different sectors including handicrafts. Attracted by this infrastructural and structural development of India in general, many foreign companies, which are thinking of relocating from China after the COVID-19 debacle, are considering of entering Indian industrial setups. India can capitalize on this situation and emerge victorious (Tripathi et al., 2022). Moreover, the domestic market takes center stage for the Indian handicraft industry, prompting a deeper exploration. In addition, microenterprises engaged in handicraft industry should have a detailed process of converting parts of their operations into flexible working setup. In this regard, promoting virtual international fairs for handicrafts by EPCH/NGOs/State Governments becomes crucial to drive sales in the "New Normal." Equipping small-scale artisans and craft enterprises with digital platform skills is essential for their sustainability. Government initiatives like "Make in India", "Vocal for Local", and "Aatmanirbhar Bharat" are also crucial to rejuvenate the handicraft sector. In addition, there are other opportunities that are sure to assist India revitalize its exports in handicrafts' sector. Besides, the recent package of INR 20 lakh with a vision of "Aatma Nirbhar Bharat" is to cater to the supply side by invigorating the demand sides is a case of concern.

Nevertheless, challenges arise from the uncertain global demand conditions, which must be continually evaluated as time unfolds. In this scenario, adopting assertive demand creation techniques and further liberalizing trade can prove effective (Punamiya, 2020 Jul 21). Moreover, the global buyer base is shifting from China, which will act as a potential opportunity. Elevating the significance of the handicraft industry as a substantial component of MSMEs in regional development, income distribution, job creation, poverty alleviation, and economic growth (Menon et al., 2021; Angraeni and Tarmidi 2021; Kumar et al., 2022a, IBEF, 2022; Tripathi et al., 2022; Yadav et al., 2022) can also pave way for further development of handicrafts sector. Given this unprecedented opportunity, Indian exporters could explore new avenues by tapping into emerging export destinations that were less affected by the pandemic, such as ASEAN nations, Latin America, Japan, Australia, and others. This diversification strategy could open up new possibilities for the Indian handicrafts sector in the post-COVID-19 landscape (Kumar et al., 2022a, Tripathi et al., 2022).

## **Implications**

### **Commercial Implications**

With more and more opportunities being generated due to infrastructural and marketing upgradation efforts with the aid of digitization, Indian handicraft industry is poised to capitalize on the global shifts in production and purchase

base. More and more capitalization of handicraft sector with fresh investments in the form of venture capital and Foreign Direct Investment (FDI), will lead to greater spread of micro and small enterprises. With better digitization and knowledge disseminating modes being upgraded, small artisan across every part of India can capitalize and ride on the digitization wave, to market their products from their own destinations. This will lead to better network of handicraft units and help develop financial viability of this sector. Handicraft units with the help of better digital marketing can improve sales and generate profits to transform it into their financial robustness. This financial strength can bolster their present condition and help them fight any unexpected calamity similar to COVID-19, plus the financial crisis. This will lead to decentralization of industrial bases and ensure large scale employment generation at the very door step of rural inhabitants, which can greatly reduce migration to already congested urban areas. Dual benefits of employment and financial benefit can boost the financial backbone of India and lead to its growth and development.

### **Social and Political Implications**

This paper highlights the utility of Indian handicrafts. With higher emphasis on development of handicraft sector, social imbalance has a tendency of being corrected in favour of poor and downtrodden. Handicraft sector majorly belongs to micro enterprises and small industries sector, under which falls the cottage industries. Cottage industries can be established with very low investment and few raw materials, which are mostly regional and leads to regional development. In this regard, it helps in lowering dependence on high capital investment, and secondly it helps in lessening the gap between socially exclusive groups. This leads to de-compartmentalization of society and helps in establishment of egalitarian system of society. Not only that, it helps in reducing gender gap by employing millions of women in rural areas. It also reduces dependence on large scale industry and urban conglomerates for generation of employment and help in reducing the rate of migration towards cities. Lastly, it helps in generating wealth and earning of valuable foreign exchange from across different nations, and spreads customs, traditions, and architectural heritage and splendor of country around the world. A country with rich spread of its culture and heritage not only garners international applause for its economic strength, but also becomes focal point of political talks, which helps gain support in international ties.

### **Implications for Women Empowerment**

Present study delineates that Indian handicraft sector comprises of more than 56% women artisans who carry on different type of artisan work across India, in different capacities. It is not only their livelihood but their self esteem, which gives recognition to their lives. Handicraft sector is source of women empowerment in India, and helps in changing the power dimension of society towards more balanced structure for women and child welfare. Growth of handicraft sector not only ensures better growth and development of international nature but welfare at the grass root level with decentralization of industries and

decentralization of power in favour of broad social justice.

## CONCLUSION & SUGGESTIONS

India experienced demand shifts during and permanent closures of Handicraft units during COVID-19 (Fairlie, 2020; Yadav et al 2022). It led to supply chain disruptions and accumulation of inventory (Kumar et al., 2022a, IBEF, 2022; Tripathi et al., 2022; Tripathi et al., 2022). With new normal in post pandemic era it is imperative to recognize the utility of digital transformation. With digital innovative entrepreneurship handicraft industry can pave way for new growth in different dimensions. The increasing preference for online purchases over exhibitions in the post-pandemic era presents a favorable opportunity for producers (Angraeni & Tarmidi 2021; Kumar et al., 2022a, IBEF, 2022; Tripathi et al., 2022). Moreover, reinventions and innovations could help handicraft adapt to the new technology and market norms and make them bear the crisis with greater strength. This not only is likely to ensure greater resilience to the handicrafts sector, also but to promote it for neck-to-neck competition with large scale industries, and promote greater growth of Indian handicrafts both domestically and internationally.

In the wake of lockdowns and the evolving "New Normal," the nation faced substantial losses, directly impacting our artisans. Organizations supporting them couldn't reinvest due to disruptions in the supply chain, leading to production shutdowns and a surplus of unsold inventory (Yadav et al., 2020; Yadav et al 2022; Igminakhase, 2021; Punamiya, 2020 Jul 21; Shinozaki & Rao, 2021; Andal et al., 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022). However, there have been many blessings, of which one is the emergence of large-scale digitization. Embracing digital transformation emerges as crucial for handicraft industry. With digitization and technology daily life is being reshaped, and it is time for a collective reboot, reset, and rediscovery to find digital solutions that uplift this creative sector. There is an urgent need for handholding and capacity building in online retailing/marketing for the handicraft industry. Exploring a "Phyital" (Omni Channel) approach presents tremendous opportunities. Establishing experience centers as a retail chain, incorporating shopping, wellness, cafes, on-site weaving, painting, and more, adds a new dimension to showcase India's culturally rich handicraft heritage on e-commerce platforms and retail chains—a one-stop-shop for all artisan community needs (Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). The shift towards online purchases over exhibitions post-pandemic presents an opportunity for producers. The domestic market becomes crucial for the Indian handicraft industry, and it's time to delve into it. Promoting virtual international fairs for handicrafts by EPCH/NGOs/State Governments encourages sales in the "New Normal". Skilling small-scale artisans and craft enterprises on digital platform utilization are essential. Government initiatives like "Make in India", "Vocal for Local", and "Aatmanirbhar Bharat" aim to revive the craft sector. Developing or promoting PPP business models can aid in recovery and sustaining business both domestically and internationally. To enhance the market presence of Indian handicrafts, addressing poor marketing and branding is

essential. Establishing an official identification mark for genuine handicraft products can safeguard their uniqueness (Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). Encouraging wards of artisans in various schools through fairs fosters appreciation for art, culture, skills, and the influence of Indian art and handicrafts (Igminakhase, 2021; Shinozaki & Rao, 2021; Andal et al., 2021; Menon et al., 2021; Angraeni and Tarmidi 2021; IBEF, 2022; Tripathi et al., 2022). In conclusion, a fitting quote for the Indian handicraft industry in this challenging situation is, "In the middle of difficulty lies opportunity," by Albert Einstein.

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